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| ToR STF 674 (Ref. Body TC HF) |
| Version: 1.3 |
| Author: Agata Sawicka – Date: 2023-05-18 |
| Last updated by: ETSI Secretariat – Date: 2023-07-07 |
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Terms of Reference –Specialist Task Force

STF 674 (Ref. Body TC HF)

Interoperable Total Conversation

Summary information

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| --- | --- | --- | --- |
| Approval status | Approved by TC HF (ref doc: HF(23)DEC117 ) | | **YES** |
| Approved by Board#143 (6-7 June 2023) | | **YES** |
| Reference Body | Ref. Body TC HF | | |
| ETSI Funding | **Maximum budget: 204 800 EUR**   * Manpower: 172 800 EUR * Travel :20 000 EUR * Workshop organization: 12 000 EUR | | |
| Minimum of 4 ETSI Members Support | **YES** | | |
| Time scale | **From** | 2023-09-01 | |
| **To** | 2025-08-31 | |
| Work Items | *List and date of the WI creation* | | |
| Board priority | [ETSI STF funding criteria](https://portal.etsi.org/STF/STFs/Funding/ETSIbudget.aspx)   |  |  | | --- | --- | | **Priority Criteria** | **X** | | Maintenance of standards in mature domains |  | | Innovation in mature domains | x | | Emerging domains for ETSI |  | | Horizontal activities (quality, security, etc.) |  | | Societal good / environmental | x | | | |

Part I – STF Technical Proposal

# Rationale & Objectives

## Rationale

The activity addresses the need for standards to support provision of accessible and interoperable communications services across Europe. Total Conversation provides the most comprehensive and accessible communications format – from the Human Factors perspective, other communications services (such as voice and/or Real-Time Text, RTT, communications services) may be seen as special cases of Total Conversation where only one or two of the three modalities are available.

The general requirement for provision of interoperable Total Conversation, as well as real-time text and voice communications services, is expected to be included in the EN 301 549. The update of the EN is to be carried out in the scope of STF614 in response to M/587 to support the implementation of the European Accessibility Act (EAA) with the appropriate standards. However, more detailed guidance on how to achieve interoperable accessible Total Conversation services (including the mandatory provision of RTT in addition to any voice communications for calls within the national numbering plan) falls beyond the scope of EN 301 549.

Still to achieve truly pan-European interoperability of the modern electronic communications services that can cover all three communication modalities (jointly provided as Total Conversation), such more detailed technical standards are indispensable. It is essential to acknowledge that in addition to technical interoperability, it is necessary to have clear and sufficiently detailed standards for functional, service and accessibility Human Factors aspects of Total Conversation to ensure interoperability with regard to human-technology and human-human interconnectivity. Otherwise, there is a risk of fragmentation in the design of service specific solutions and consequently in the user experience, which will impede interoperability across Member States. Lack of the sufficient guidance with respect to Human Factors will also make it difficult both for the market players and the authorities to ensure provision of useful and accessible services.

The relevant clause in the EN 301 549 is expected to refer to the standard developed as an outcome of the proposed action. The developed ES will facilitate meeting the requirements of the EAA with respect to the accessibility of electronic services, including the mandatory provision of RTT and Total Conversation, in a uniform way. It will also provide a common basis for implementation of Total Conversation across Europe (including the mandatory provision of RTT) in more specialised context of emergency communications or relay services, allowing for achievement of the overall interoperability from the user experience perspective in the same manner as is today offered by voice communications.

## Objectives of the work to be executed

The overall goal of the proposed project is to develop an ETSI standard on functional, service and accessibility requirements that must be met from the Human Factors perspective in order to ensure that the Total Conversation offered is compliant with the requirements of the EAA. In particular, that the Total Conversation is available to all users (e.g., does not require proprietary solutions, or is available without subscription/pre-registration, where feasible for emergency communications) and that it is interoperable from the Human Factors perspective ensuring human-technology and human-human interconnectivity across electronic communications networks, user terminal equipment and users, as well as across the national borders in the EU/EEA.

The set of Human Factors requirements for any Total Conversation service or user terminal will be developed by following a broad and comprehensive process. In particular, the scope of the proposed activity encompasses three phases:

* Phase I: Pre-study outlining the background necessary for identification of functional, service and accessibility requirements to achieve pan-European interoperable Total Conversation. The results will be included in the Informative Annex of the ES.
* Phase II: A series of workshops gathering a broad range of stakeholders including service providers and developers, terminal equipment producers and distributors, regulators, but also users and user stakeholder organisations. During the workshops most viable solutions will be explored in practice, helping to identify functional, service and accessibility requirements necessary for provision of Interoperable Total Conversation. Effective wireless coupling to relevant assistive technologies and user terminal equipment will be explored, and feasible and available fall-back options will also be examined. The workshops will serve also as knowledge and awareness raising events, providing important input for development of the ES.
* Phase III: Development of the ES with the functional, service and accessibility requirements that must be met for Total Conversation services to comply with the EAA.

As indicated, the standard developed in the scope of the project will help the industry and authorities in Europe to meet the general accessibility requirements for accessible electronic communication services covered by the updated version of the EN 301 549 (carried out in the scope of STF 614). The project is planned for 24 months, and its realization will be closely coordinated with the STF 614. It is important to emphasise that the proposed project is not limited to the development of the ES but includes also activities aimed at raising the overall awareness and building of a consensus across the relevant stakeholders in Europe. Developing of such a broad understanding and support will allow for more effective implementation of the proposed standard.

## Previous funded activities in the same domain

During the last 5 years, there has been one STF related to the area of the proposed project:

STF 605 developed ETSI TR 103 708 V1.1.1 Human Factors (HF); Real-Time Text (RTT) in Multiparty Conference Calling. The work resulted in a Technical Report developed to support future upgrading of those parts of the EN 301 549 "Accessibility requirements for ICT products and services" standard that relate to the accessibility of Real-Time Text (RTT) when used in multiparty/conference applications. The results focused on RTT and did not address the HF requirements in the broader Total Conversation Context.

## Market impact

Compliance with the EAA shall be mandatory for ICT products and services.

Interoperable Total Conversation is one of the requested functionalities. Currently available standards allow for implementation of Total Conversation but are not sufficient to achieve compliance with the EAA from the Human Factors perspective. As indicated, pure technical interoperability does not guarantee a user-experience that would be perceived as interoperable. Hence, in addition to the existing technical standards for Total Conversation, there is a need for a common standard with functional, service and accessibility requirements from the Human Factors perspective. The needed standard will be the outcome of the proposed action, providing the necessary guidelines for successfully usage of Total Conversation across Europe in an interoperable way, widely available to all users, without the need of special app installation or subscription/pre-registration, where feasible for emergency communications or the necessity to use proprietary solutions. The proposed standard will also provide for appropriate integration from the user perspective with assistive technologies.

Provision of the basic functional, service and provision requirements for Total Conversation services would ensure service interoperability across Member States, supporting in a vital way achievement of fully accessible emergency communications or relay services – also required by the EAA.

It is important to notice that the proposed work will lead to a standard which will benefit not only the electronic communications services domain at large, but will provide a specific and necessary support for specific domains, in particular emergency communications. The need for a clarification or specification has been raised from several European PSAP within the EENA. Among those at the latest EENA meeting by the Swedish PSAP -Björn Skoglund -SOS Alarm in January 2023.

Finally, it is worth mentioning that while one of the EAA aims is to ensure equality in access to ICT services and products for end-users with disabilities, the same provisions will be beneficial for all users. This seems to be especially valid for electronic communications, where the flexibility brought by Total Conversation is likely to be desired by all users who may prefer different conversation modality depending on the situation they are in (e.g., preference for RTT in noisy environments, or video and voice mode when wanting to include an additional party in the conversation).

## Consequences if not agreed

Without the proposed ES, achieving interoperability across Europe (which is one of the central goals of the EAA in the area of electronic communications) is highly unlikely. There will be a risk of different countries adopting various solutions to provide Total Conversation – possibly based on proprietary services, requiring subscription, or failing to sufficiently support users using assistive technologies. Consequently, it will not be easy or even possible for users to use Total Conversation freely across EU/EEA region.

The overall ability to demonstrate/monitor compliance with the EAA requirements will also be limited. As Total Conversation involves call conversations supporting three different media types – voice, Real-Time Text and video, the provided standard on Human Factors aspects of Total Conversation will also give guidelines for how RTT is to be provided. As such the standard will also support implementation of the RTT as part of the electronic communications in Europe.

Without clear, well-defined functional service and accessibility requirements that focus on Human Factors, regulators in different countries are likely to adopt different guidelines including minimum acceptable functional services and accessibility. The consequence could even be a difference in how Total Conversation or Real-Time Text calls are supported from the user-perspective in different parts of Europe, or implementation of fragmented, proprietary solutions. This would impede the overall effectiveness of the EAA regulations and most likely effectively undermine the overall objective of providing accessible and interoperable electronic communications across Europe.

# Relation with ETSI strategy and priorities

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| **Priority Criteria** | **Rationale** |
| Maintenance of standards in mature domains |  |
| Innovation in mature domains | Majority of standards in the area of electronic communications focus on technical aspects of the services and devices. Human Factors aspects for the basic voice-only electronic communications service has evolved by large naturally over the years. Specific issues related to accessibility has been addressed by a number of standards produced over the years by ETSI TC HF, ETSI ES 202 975: Human Factors (HF); Requirements for relay services. Recently, an effort has been also invested in progressing the standardization work with respect to electronic communications services beyond the voice modality, ETSI TR 103 708 V1.1.1 Human Factors (HF); Real-Time Text (RTT) in Multiparty Conference Calling, clauses in the EN v3.2.1.  Still, with the current need to support the implementation of the EAA requirements for interoperable accessible electronic communications services across Europe, there is an urgent need to provide a comprehensive and coherent standard on Total Conversation services that include all or some of three communication modalities concurrently. |
| Emerging domains for ETSI |  |
| Horizontal activities (quality, security, etc.) |  |
| Societal good / environmental | Provision of electronic communications services in a Total Conversation format (either providing all three modalities, voice-RTT-video, or only RTT) will make the services more accessible for deaf or hard of hearing users, ensuring greater inclusiveness and equality. However, the Total Conversations functionality is likely to benefit all the end-users, who may prefer other than voice modes of communications under certain circumstances (e.g. in a noisy or silent environments). The Total Conversation format seems especially crucial in the context of emergency situations, where any additional information that may be conveyed by video may bring valuable input to emergency or civil protection authorities. Hence, ensuring that there is a sound standard to implement interoperable Total Conversation for electronic communication services would bring substantial societal benefits. |

# ETSI Members Support

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| --- | --- | --- |
| **#** | **ETSI Member** | **Supporting delegate** |
| 1 | ITS | Agata Sawicka |
| 2 | PTS | Robert Hecht |
| 3 | ANEC | Nikolaos Floratos |
| 4 | NKOM | Johannes Vallesverd |

# Deliverables

## Base documents

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| **Document** | **Title** | **Status** |
| EN 301 549 | Accessibility requirements for ICT products and services | published |

## New deliverables

|  |  |  |  |
| --- | --- | --- | --- |
| **Deliv.** | **Work Item code**  **Standard number** | **Working title**  **Scope** | **Expected date for publication** |
| D1 | [DES/HF-00301559 (ES)](https://portal.etsi.org/webapp/WorkProgram/Report_WorkItem.asp?WKI_ID=63786) | Requirements for (Interoperable) Total Conversation services:  Scope: The document provides detailed functional, service and accessibility requirements from the Human Factors perspective for the implementation of and compliance with the European Accessibility Act which requires the provision of Interoperable Total Conversation (InToCo) services avoiding proprietary solutions and the need for user pre-registration, where feasible for emergency communications. It details how to ensure that InToCo service, with voice, RTT and sign language-supportive video communication modes synchronized, is provided as a context-optimised service, also detailing viable fall-back options. Effective wireless coupling to hearing technologies, with the avoidance of interferences with assistive devices, and beyond, will also be addressed. The necessary background information and specifications containing technical parameters would be provided as informative annexes to the ES. The ES will additionally provide a guidance on how to ensure that the InToCo services for emergency communications, required by the EAA, are implemented in a manner that accounts for the Human Factors aspects. As such the ES complements other standards developed in the area, such as EN 301 549 or EMTEL TS 101 470. |  |

# Maximum budget

## Task summary/Manpower Budget

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| --- | --- |
| **Task short description** | Budget (EUR) |
| Task 1: Project management | 12800 |
| Task 2: Explore interoperable Total Conversation for electronic communications services | 64000 |
| Task 3: Standardisation documents development. | 96000 |
| **TOTAL** | 172800 |

## Travel budget

Travel budget: total of 20k€

* For reference TB progress reporting: 10 k€
* For liaisons with and presentations to other bodies: 10k€

## Other budget line

For workshops (travel, premises, access fees (if any) and technical support): 3x 4k€ = 12k€

Part II – Details on STF Technical Proposal

# Tasks, Technical Bodies and other stakeholders

## Organization of the work

STF team experts will be responsible for running the workshop events and writing the ES with the Informative Annex parts. However, the process is intended to be carried out in an open and inclusive manner. We envision establishment of three reference groups addressing:

* User-experience aspects
* User terminal equipment aspects
* Regulatory aspects

To ensure the sufficient involvement of all relevant stakeholders, the interim version of the ES will be made available for commenting using the IT tools like GitHub – also to ensure cohesion with other related activities, like revision of EN 301 549 proposed as STF 614.

Coordination with outside reference groups will mostly go through the ETSI/CEN/Cenelec JWG on eAccessibility. However, in special cases direct liaisons will be established. This may be especially relevant in case of the ETSI TC EMTEL.

## Tasks for which the STF support is necessary

* Examination of current implementations of Total Conversation services
* Involving internal and external stakeholders
* Running a series of workshops and facilitating broad discussions among all relevant stakeholders to explore in detail Human Factors aspects of Total Conversation, both from the service and terminal perspectives
* Developing a coherent set of functional, service and accessibility requirements, on all applicable levels, enabling the setup and provision of interoperable Total Conversation services.
* Producing ES with the HF requirements for Total Conversation that would be widely accepted and adopted

Due to the limited work power of TC HF this work cannot be performed without external support.

## Other interested ETSI Technical Bodies

* ETSI TC EMTEL: consultation and review of the results of the proposed STF

## Other stakeholders

The proposed work needs to be closely coordinated with the planned revision of the EN 301 549 to be carried out by the STF 614. The results will be consulted and reviewed with the STF 614 experts working on the relevant parts of the EN.

The same will apply to STF 666 envisioned to deliver an update of the ES 202 975.

Coordination with outside reference groups will mostly go through the ETSI/CEN/Cenelec JWG on eAccessibility. However, in special cases direct liaisons will be established. This may be especially relevant in case of the ETSI TC EMTEL.

Additionally, as indicated in section 6.1, the STF will establish three reference groups addressing user-experience aspects, user terminal equipment aspects and regulatory aspects.

Part III: Execution of Work

# Work plan, time scale and resources

## Task Description

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| --- | --- |
| **Task 0** | **Project management** |
| **Objectives** | The goal of Project Management is to ensure that the objectives of the project, are achieved within the foreseen time and budget. |
| **Input** | * STF work plan * Work plans of other relevant workgroups (STF 614, EMTEL) |
| **Output** | * Selection of STF experts * Invitation of relevant stakeholders to participate in a Reference Group * Detailed project planning and coordination of the work among the STF experts, and with the relevant workgroups (STF 614, STF 666, EMTEL) * Periodic reports to ETSI TC HC |
| **Interactions** | * STF and the reference group * STF 614, STF 666, TC EMTEL * Decision body (TC HF)   + Approval of the outputs |
| **Resources required** | STF project leader: 20 days |

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| **Task 1** | **Explore interoperable Total Conversation for electronic communications services** |
| **Objectives** | Explore interoperable Total Conversation as a service for users in Europe available as part of the electronic communications services to identify:   * end-user needs; develop an understanding of the key functional and service provision characteristics for accessible and interoperable Total Conversation * interoperability issues from the user perspective, focusing user terminal equipment, also including possible interoperability issues with assistive technologies |
| **Input** | * Existing standard documents on Human Factors concerning Total Conversation or RTT, ETSI TR 102 575 v1.2.1, EN 301 549 v3.2.1, ETSI TR 103 708 V1.1.1 * Information on current state of the art implementations of Total Conversation/RTT – to be gathered through a desk study, interviews with the relevant stakeholders and during the workshops |
| **Output** | * An Informative Annex of the ES with the necessary background for defining the functional, provision and accessibility requirements for interoperable Total Conversation – user experience specific aspects and user terminal equipment aspects. * Workshop exploring end-user needs and developing an understanding of the key functional and service provision characteristics for accessible and interoperable Total Conversation * Workshop exploring interoperability issues from the user perspective, focusing user terminal equipment, also including possible interoperability issues with assistive technologies |
| **Interactions** | The task will require a close dialogue between STF experts, the members of the three reference groups.  The task will require a close dialogue between the STF experts and the experts working on relevant projects:   * Experts of STF 614 working on the clauses of the EN 301 549 addressing the general accessibility requirements for Total Conversation/RTT and Relay Services * Experts of STF 666 (if funded) working on the update of the ES 202 975 on HF requirements for Relay Services * Experts of TC EMTEL working on project addressing the use of Total Conversation/RTT and Relay services in emergency communications   Decision body (TC HF)   * + Approval of the outputs. |
| **Resources required** | Work effort STF:   * Development of the Informative Annex: 40 days * Preparing and conducting workshop on end-user needs: 40 days * Preparing and conducting workshop on interoperability issues from the user perspective (focus on user terminal equipment): 20 days |

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| **Task 2** | **Standardisation documents development** |
| **Objectives** | The aim of the task is to develop the ES with the functional, service and provision requirements for accessible interoperable Total Conversation – covering both the user experience and user terminal equipment specific requirements. |
| **Input** | * The results of the Task 2:   + An Informative Annex   + The results of the interviews with relevant stakeholders, and two workshops * The outcomes of STF 614 related to Total Conversation/RTT and Relay services, STF 666 (if funded) and the relevant projects carried out by TC EMTEL |
| **Output** | * The ES with the functional, service and provision requirements for accessible interoperable Total Conversation – covering both the user experience and user terminal equipment specific requirements * Final workshop presenting the best solutions – an event aiming at providing a hands-on experience for user terminal equipment distributors, service operators and regulators on how standards support provision of interoperable Total Conversation |
| **Interactions** | STF experts:   * Discussions and writing of the ES * Dialogue with STF 614 to ensure that the ES is coherent and complementary with the new version of the EN 301 549 * Preparation and conduction of the final workshop   Reference Group and other relevant stakeholders:   * Review and comments on the drafts of the ES * Participation in the final workshop   Experts of other relevant ETSI workgroups, STF 614, STF 666, EMTEL:   * Review and comments on the drafts of the ES * Participation in the final workshop   Decision body (TC HF)   * Approval of the outputs. |
| **Resources required** | Necessary effort:   * STF   + Writing of the ES: 100 days   + Preparations and conduction of the final workshop: 30 days |

## Milestones

Milestone A

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| --- | --- | --- |
| **Milestone** | **Description** | **Cut-Off Date** |
| **A** | Task 1:  An Informative Annex of the ES with the necessary background for defining the functional, provision and accessibility requirements for interoperable Total Conversation – user experience specific aspects and user terminal equipment aspects | T0+6M |
| Reference Body Deliverable | Informative Annex of the ES approved by Reference Body |
| ETSI Deliverable | Final version of the Informative Annex of the ES approved by Reference Body  Progress Report#1 approved by TC HF |

Milestone B

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| --- | --- | --- |
| **Milestone** | **Description** | **Cut-Off Date** |
| **B** | Task1:  Report on the workshop user terminal equipment aspects  Task 2:  First draft of the ES with functional, service and accessibility requirements for interoperable Total Conversation and user terminal equipment | T0+10M |
| Reference Body Deliverable | Early Draft endorsed by Reference Body |
| ETSI Deliverable | Progress Report#2  Early Draft endorsed by Reference Body  Report on the workshop approved by Reference Body |

Milestone C

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| **Milestone** | **Description** | **Cut-Off Date** |
| **C** | Task 1:  Report from the workshop user-experience aspects  Task 2:  Interim draft of the ES with functional, service and accessibility requirements for interoperable Total Conversation and user terminal equipment | T0+16M |
| Reference Body Deliverable | Stable Draft approved by Reference Body |
| ETSI Deliverable | Progress Report#3 approved by Reference Body  Stable Draft endorsed by Reference Body  Final report on the workshop approved by Reference Body |

Milestone D

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| **Milestone** | **Description** | **Cut-Off Date** |
| **D** | Task 2:  Final version of the ES with functional, service and accessibility requirements for interoperable Total Conversation and user terminal equipment | T0+20M |
| Reference Body Deliverable | Final Draft approved by Reference Body |
| ETSI Deliverable | Final ES approved by Reference Body |

Milestone E

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| **Milestone** | **Description** | **Cut-Off Date** |
| **E** | Task 0:  Final STF report summarizing the work carried out by the STF | T0+24M |
| Reference Body Deliverable | Final ES approved by ETSI membership and published |
| ETSI Deliverable | Final Report approved by Reference Body  Deliverable published, STF closed |

## Task summary

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| --- | --- | --- | --- | --- |
| **Code** | **Task / Milestone** | Target Date | | Estimated Cost (EUR) |
| From | To |
|  | Start of work |  |  |  |
| T0 | Project management and coordination | T0 | T0+24 | 12.800 |
| T1 | Explore interoperable Total Conversation for electronic communications services | T0+2 | T0+14 | 64.000 |
| Milestone A | Informative Annex of the ES available  Progress report#1 to be approved by TC HF | T0+6 |  |  |
| Milestone B Task 1 | Report on the workshop on terminal equipment aspects approved by TC HF  Early Draft of ES to be endorsed by Reference Body | T0+10 |  |  |
| Milestone C  Task 1 | Report from the workshop user-experience aspects approved by TC HF | T0+16 |  |  |
| T2 | Standardisation document (ES) development | T0+4 | T0+24 | 96.000 |
| Milestone B Task 2 | Early Draft of ES to be endorsed by Reference Body | T0+10 |  |  |
| Milestone C Task 2 | Stable Draft of ES approved by Reference Body | T0+16 |  |  |
| Milestone D | Document ready for member voting  Final draft approved by TC HF | T0+20 |  |  |
| Milestone E | Member voting passed, final report approved by TC HF  Deliverables published, STF closed | T0+24 |  |  |
|  | | | | **172.800** |

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| **Task/ Mil.** | **S** | **O** | **N** | **D** |  | **J** | **F** | **M** | **A** | **M** | **J** | **J** | **A** | **S** | **O** | **N** | **D** |  | **J** | **F** | **M** | **A** | **M** | **J** | **J** | **A** |
| T0 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| T1 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MA |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MB |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MC |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| T2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MB |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MC |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| MD |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ME |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

# Expertise required

## Team structure

(Up to) 4 participants to ensure the following mix of competences:

|  |  |
| --- | --- |
| **Priority** | **Qualifications and competences** |
| High | Experience in project management |
| High | Expertise in accessible electronic communications, especially with the knowledge of Total Conversation |
| High | Expertise in accessibility and usability engineering and design |
| High | Expertise in Human Factors standardisation |
| High | Expertise in electronic communications regulations concerning delivery of accessible services |

Part IV: STF performance evaluation criteria

# Performance Indicators

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| --- | --- |
| **Select relevant Performance indicators applicable for these ToR (X)** | |
| Contribution from ETSI Members to STF work | |
| Direct financial contribution (co-funding) |  |
| Support to the STF work (e.g., provision of test–beds, organization of workshops, events) |  |
| Steering Group meetings (number of meetings / participants / duration) | x |
| Number of delegates directly involved in the review of the deliverables | x |
| Contributions/comments received from the reference Reference Bodies | x |
| Contributions/comments received from other Reference Bodies |  |
|  |  |
| **Contribution from the STF to ETSI work** | |
| Contributions to Reference Body meetings (number of documents / meetings / participants) | x |
| Contributions to other Reference Bodies | x |
| Presentations in workshops, conferences, stakeholder meetings | x |
|  |  |
| **Liaison with other stakeholders** | |
| Stakeholder participation in the project (category, business area) | x |
| Cooperation with other standardization bodies |  |
| Potential interest of new members to join ETSI |  |
| Liaison to identify requirements and raise awareness on ETSI deliverables |  |
| Comments received on drafts (e.g. on WEB site, mailing lists, etc.) | x |
|  |  |
| **Quality of deliverables** | |
| Approval of deliverables according to schedule | x |
| Respect of time scale, with reference to start/end dates in the approved ToR | x |
| Comments from Quality review by Reference Body | x |
| Comments from Quality review by ETSI Secretariat | x |
|  |  |

Time recording

For reporting purposes, the STF experts shall fill in the time sheet provided by ETSI with the days spent for the performance of the services.

During the activity, the STF Leader shall collect the relevant information, as necessary to measure the performance indicators. The result will be presented in the Final Report.

# Document history

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Date** | **Author** | **Status** | **Comments** |
| 1.0 | 2023-05-21 | TC HF | Final draft |  |
| 1.1 | 2023-05-25 | ETSI Secretariat | Final draft | Update before Board submission |
| 1;2 | 2023-06-20 | TC HF | Final draft | Editorial updates during TC HF#91 plenary |
| 1.3 | 2023-07-07 | ETSI Secretariat | Final | Milestone update before CL publication |

Annex I Response to the Request for Proposals  
CfE – STF 674 (REFERENCE BODY HF) Deadline: 07/08/2023

**If you are an ETSI Member \***

**ETSI membership status (Indicate your status):**

Full

Associate

Observer

**If you are not an ETSI Member \***

Please indicate:

**Full name of the ETSI member supporting the application (list of ETSI members on etsi.org):**

-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Official contact name of the ETSI member supporting the application:**

-\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Note: A formal confirmation of the support from the Official contact is required (e.g. by e-mail sent to STFLINK@etsi.org) and an “ETSI Member Support Letter” will be required if you are selected.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Contractor information \*** | | | | |
|  | | | | |
| **Contractor name \*:**  *Indicate the Company/Organization Name* | |  | | |
|  | | | | |
| **Contact person for the technical aspects** | | **Contact person for Decision on ETSI financial offer to this project (if any)** | | |
| Title |  | Title |  | |
| First name |  | First name |  | |
| Last name |  | Last name |  | |
| Role |  | Role |  | |
| e-mail |  | e-mail |  | |
| Phone |  | Phone |  | |
|  | | | | |
|  | | **Yes** | | **No** |
| Do you or any employee of your Company/Organization hold an elected or appointed position in the Reference Body requesting the  674 creation? | | o  Indicate in which position:  ----------------------------------- | | o |
| **If you are self-employed candidate:**  Do you currently have other contracts in progress with ETSI? | | o | | o |

All fields marked with an asterix (\*) are mandatory

**1.1 Introduction**

A short presentation of the technical structure responsible for this activity, e.g.:

* Business area, number of employees, link to WEB site,
* Department(s)/team(s)/experts in charge of the technical activities related to this Project,
* Reference to products/services of your Company/Organization or supporting Member to which the standards developed by this Project will apply,
* Motivation for your Company/Organization or supporting Member to participate in this Project.

**1.2 Proposed approach**

**Proposed contribution to tasks & related cost**

Identify the tasks to which your Company/Organization is proposing to contribute by filling-in the table below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tasks No | Tasks Description | Max Budget Allocated in Euro | Amount in Euro (mandatory) | % of whole Task (mandatory) |
| 00 | Project management and coordination | 12 800 | . | . |
| 01 | Explore interoperable Total Conversation for electronic communications services | 64 000 | . | . |
| 02 | Standardisation document (ES) development | 96 000 | . | . |
| Total |  | 172 800 |  |  |

**Amount in Euro (mandatory)**: Indicate the price offered for your contribution to the task(s)

**% of whole task (mandatory)**: Indicate to which percentage of the execution of the whole task your offer corresponds

Provide a description of the proposed approach, competences, reference to related activities:

* Explain which part of the task is corresponding to the requested percentage that your Company/Organization will handle,
* Explain the scope that your Company/Organization will cover,
* Explain your approach to the management of the quality and,
* Explain your approach to the management of the risks and their mitigation,
* Describe and justify the proposed costs to achieve this project objectives.

Annex II Terms and Conditions  
CfE – STF 674 (REFERENCE BODY HF) Deadline: 07/08/2023

**2.1 Submission of Proposals**

All proposals in response to this CfE shall be submitted before the deadline indicated in thisCollective Letter, using exclusively the WEB application on the ETSI Portal at the following address: <https://portal.etsi.org/cfe>.

Proposals shall be composed of Curriculum Vitae of the proposed service providers’ personnel and the Annex I of this CfE duly filled-out.

Proposals that will be partial or incomplete at the deadline will not be accepted.

The Terms and Conditions in this Annex will apply.

**2.2 Modification and Withdrawal of Proposals**

Applicants may, without prejudice to themselves, modify or withdraw their proposal by written request, provided that the request is received by ETSI prior to the due date and time, at the address to which their proposal was submitted. The applicant may submit a new proposal provided that such new proposal is received prior to the deadline for responding which is specified in this Collective Letter.

**2.3 Assessment of Proposals**

The ETSI Director-General, in consultation with the Reference Body Chairman, is responsible for the selection of the service providers that will be contracted to perform this Project work. The ETSI Director-General and the Reference Body Chairman may be assisted by a Selection Panel to assess the applications received and make the final decision.

As per article 1.10.4 of the ETSI Directives, the Director-General may discard proposals that could be identified as creating potential conflict of interest.

The ETSI Secretariat will only communicate to the applicants the result of the selection (accepted or not accepted). Should applicants need more information on the rationale for the selection, they must address a formal request to the ETSI Director-General.

The following evaluation criteria will be applied to all proposals, in order of priority:

* Evidence that the applicant has the necessary structure and expertise to ensure delivery
* Reference to current or previous activities in the specific technical domain of this project
* Critical review of the most efficient way to achieve the objectives in this Project ToR
* Effective proposed approach/methodology for the execution of the tasks
* Implementation schedule
* Clear pricing policy

Compliance with the first two (2) criteria is mandatory.

Proposals that are not considered compliant with these criteria will be discarded.

Priority will be given to technical quality of the proposals. Pricing considerations will be taken into account to ensure that the best value for money is achieved. Compatibility with the maximum budget allocated to this Project will be verified before placing a Service Contract.

Following the assessment process, ETSI reserves the right to grant contracts to other than the cheapest proposals, to accept or reject any offer completely or in part, or to reject all proposals, without providing the reasons. If no offer is accepted, ETSI may decide to abandon the work or proceed in any other manner ETSI may select.

**2.4 IPR and confidentiality Agreements**

The information provided in this CfE, as well as the fact that the applicant has received the CfE, is considered confidential and protected under copyright laws. The applicant may not discuss, share, or use the information in this CfE for any purpose other than the response to this CfE.

ETSI will not disclose the content of any proposals to other applicants or any other party, with the exception of the persons involved in the assessment process described in §2.3 above.

However, ETSI reserves the right to make use of the information provided in this proposal to improve this project definition for the purpose of this CfE or any other manner in which ETSI may decide to proceed to select the service providers.

If successful, the applicant will be required to sign a Service Contract, which includes IPR and Confidentiality clauses aligned with the relevant policies in the ETSI Directives.

**2.5 Preparation cost**

ETSI will not be responsible for any costs or expenses that the applicant may incur in preparing and/or submitting the proposal.

**2.6 Service Contract**

A Service Contract will be proposed to the applicants that will be selected to perform the work.

Details on the Terms and Conditions of this contract can be found on the ETSI Portal, at the following address: <https://portal.etsi.org/STF/STFs/Contracts.aspx>